DOCUMENT RESUME

ED 116 387 EC 080 768

TITLE	Resource Units for Instruction in Preparing Youth for Occupations in Recreational-Environmental Vocations. Wisconsin V.E.A. Project No. 1-20755104.
INSTITUTION	Merrill Area Public Schools, Wis.
SPONS AGENCY	Wisconsin State Dept. of Public Instruction, Madison.
PUB DATE	72
NOTE	42p.
EDRS PRICE	MF-$0.76 HC-$1.95 Plus Postage
DESCRIPTORS	Environmental Education; Exceptional Child Education; *Handicapped Children; *Outdoor Education; *Program Descriptions; Program Development; Records (Forms); *Recreation; Summer Programs; *Vocational Education
IDENTIFIERS	Wisconsin

ABSTRACT

Described in the handbook is the Merrill Area (Wisconsin) Public Schools program to prepare handicapped youth for occupations in recreational-environmental vocations. In Part I, a school forest summer curriculum workshop already tested with handicapped children is outlined in terms of purpose and philosophy (to increase the special vocational education opportunities for handicapped youth through job training in the outdoor laboratory environment), 25 objectives (such as to understand and respect the need for ecological controls), curriculum sequence, format, methods, evaluation, and resources. Included in Part II on developing programs and services for the handicapped are brief sections on the classification, incidence, and educational provisions for mentally retarded, hearing impaired, speech impaired, visually impaired, emotionally disturbed and socially maladjusted, crippled and health impaired, and specifically learning disabled children. The remainder of the document is devoted to information necessary to filling out such forms as program applications, vocational education applications, expenditure and travel reimbursement reports, and encumbrances reports. Sample forms and applications are also provided. (SB)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED116387

Nels P. Evjue Memorial Forest
Outdoor Laboratory
Merrill Area Public Schools
Merrill, Wisconsin 54452

RECREATIONAL - ENVIRONMENTAL - VOCATIONS

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

Project No. 1-2075S104
Vocational Education Act
Wisconsin Department of Public Instruction

EC 080 768

RESOURCE UNITS

FOR

INSTRUCTION

IN

PREPARING YOUTH FOR OCCUPATIONS

IN

RECREATIONAL - ENVIRONMENTAL VOCATIONS

GROUNDS BEAUTIFICATION

BUILDING MAINTENANCE

CONSTRUCTION

FORESTRY

WILDLIFE

ENVIRONMENTAL TESTING AND CONTROLS

HOMEMAKEING

RECREATIONAL VOCATIONS

FOOD PREPARATION AND SERVING

WISCONSIN V.E.A. PROJECT NO. 1-2075S104

BY

BOARD OF EDUCATION

MERRILL AREA PUBLIC SCHOOLS

MERRILL, WISCONSIN

ROGER G. LOWNEY

SUPERINTENDENT

1972

TABLE OF CONTENTS

	PAGE
Philosophy	i
Forward	ii
Introduction	iii
I. 1971 School Forest Summer Curriculum Workshop	1
A. Purpose and Philosophy	1
B. Objectives	1
C. Sequence	3
D. Format	3
E. Methods	3
F. Evaluation	4
G. Resources	4
II. Developing Programs and Services for the Handicapped	5
A. General	5
B. Program Requirements	5
C. Project Proposals	6
D. Handicapped	7
E. Mentally Retarded	7
F. Hearing Impaired	8
G. Speech Impaired	8
H. Visually Impaired	9
I. Emotionally Disturbed and Socially Maladjusted	9
J. Crippled and Health Impaired	10
K. Specific Learning Disabilities	10

TABLE OF CONTENTS
Continued

		PAGE
III.	General Procedures for Program Application	11
	A. Annual Application	11
	B. Renewal Applications	11
	C. Approved Program Obligations	12
	D. Schedule for Records and Reports	12
IV.	Instructions for Completing Vocational Education Application	13
V.	Priorities of Expenditures	16
VI.	Travel Reimbursement Policy Amended July 1, 1970	20
VII.	General Procedures	21
VIII.	Encumbrances	22
IX.	Claim for Reimbursement	24
X.	Non-reimbursable Items	28

P H I L O S O P H Y

We believe that the Merrill Area Public Schools should provide the best possible education commensurate with our resources so that each student will have an equal opportunity to achieve his maximum potential as a member of our democratic society. We believe that the school should constantly strive to foster in each individual an appreciation of his responsibilities to this society by providing him with the necessary knowledge and skills. We believe the schools should encourage the development of patriotism, aesthetic appreciation, critical thinking, physical fitness, and creativity. We believe the student should experience respect for the rights of others, awareness of world affairs, and understanding of the inter-relationships of nations.

We believe the schools should encourage the preservation and perfection of our democratic society and promote an attitude of respect and appreciation for our cultural heritage. We believe the schools should meet the demands of a changing world by adopting and applying new knowledge and technology in the improvement of education, interpreting social change, thus helping youth prepare for life and showing leadership in meeting the many challenges of changing times.

F O R W A R D

It is a pleasure for the Merrill Area Public Schools to present this handbook describing the program to prepare youth for occupations in Recreational - Environmental Vocations, an old industry with a new awakening of nationwide importance as humans search for identify and self-preservation in the face of possible self-destruction.

Funds from the federal Vocational Education Act administered by the State Department of Public Instruction supplemented local funds in supporting the development units based on the format of the Persisting Life Situations (PLS), the Wisconsin EMR Curriculum, A Persisting Life Needs Approach to a Curriculum for the Educable Mentally Retarded.

Each unit represents a suggested starting point for instruction. Each teacher is encouraged to revise, delete, extend, and expand according to his particular experiences.

Appreciation is extended to all who participated in producing these initial documents.

ROGER G. LOWNEY
Superintendent of Schools

AUGUSTO G. MUNOZ,
Director of Instruction

INTRODUCTION

Key issues and concerns of today are for a return to an ecological balance with an end to pollution, occupational preparation with an end to high unemployment, recreation with relief for social and personal adjustment problems, and values with a search for a new idealistic future.

Problems or conditions which limit those achievements include a lack of leadership, direction and self-direction, and materials which can provide guidance in instruction to help fulfill a final goal of an ever inspiring and ever satisfying peaceful existence of humans and their surroundings.

The Persisting Life Situation (PLS) units in the overall area of Recreational - Environmental Vocations represent an initial effort to provide materials for leadership in instruction toward meeting the final goal. Each unit has specified objectives with suggested activities and materials for meeting those objectives. The units for Recreational - Environmental Vocations were developed and tested with handicapped children at the Nels P. Evjue Memorial Forest, outdoor laboratory. More units will be developed and tested as the project continues. Ideally, the students will develop skills and/or knowledge of skills that will enable them to satisfactorily meet the problems life and society demand of them. These units were developed and tested with mentally retarded students, but are applicable to students of all abilities. This material is not fully completed as a unit on forest management is being developed, and the units on outdoor recreation will be expanded. With improvements and expansion of the Outdoor Laboratory facilities, other units of work may be undertaken. Your reaction to our initial efforts will be appreciated.

ELBRIDGE CURTIS,

Project Director

I. 1971 SCHOOL FOREST SUMMER CURRICULUM WORKSHOP

SUBJECT:
Environmental - Recreational Vocations Project

MEMBERS:
Elbridge Curtis, Director of Project
Harlan Adams, L.V.E.C. Director
Ruth Dreger, Special Education Teacher
Irene Ellingson, Special Education Teacher
Evelyn Pergande, Special Education Teacher
Frank Roskos, Special Education Teacher
Don Simek, Chairman - Business Education Department
Twila Will, Special Education Teacher

CONSULTANTS:
Wilbur Kalinke
Fred Snyder
James Wood

CENTRAL ADMINISTRATORS:
Roger G. Lowney, Merrill Area Public Schools Superintendent
Robert K. Opsahl, Director of Administrative Services
Augusto C. Munoz, Director of Instructional Services

A. PURPOSE AND PHILOSOPHY

The handicapped child has a constellation of many positive behaviors, skills and characteristics. The public school represents the social institution devoted to programs of formal instruction. The Outdoor Laboratory as an adjunct to the public school can enlarge upon these behaviors, skills and characteristics. It is a resource laboratory in which the handicapped child can develop recreational and vocational skills.

The purpose of the project is to increase the special vocational education opportunities for handicapped youth with the development of training programs extending the classroom through job training in the Outdoor Laboratory environment where learning by doing will be the essential component.

B. OBJECTIVES

1. To assess the adaptability of handicapped students working in an outdoor situation.

2. To develop meaningful learning experiences.

3. To develop competency in performing assigned tasks in an outdoor situation.

4. To develop an ability to see relationships between cause and effect.

5. To grow in an appreciation of the environment.

6. To understand and respect the need for ecological controls.

7. To develop and strengthen skills and dexterity in handling tools and equipment.

8. To develop and nurture a feeling of self-confidence.

9. To achieve personal satisfaction in accomplishment of an assigned task.

10. To help students build a better self-image.

11. To help students learn to get along well with others.

12. To help students learn to cooperate when working with others.

13. To apply knowledge, skills, attitudes and understandings essential to problem solving.

14. To apply knowledge, skills, attitudes and understandings essential to earning a living.

15. To develop skills essential for operation of recreation related vocations.

16. To develop skills in using tools and materials to product a finished product.

17. To develop "eye-hand" coordination necessary to manipulate tools and equipment.

18. To develop and maintain physical and mental health.

19. To think critically and act responsibly.

20. To develop an awareness of differences in the varying abilities of others.

21. To develop interest and skill in worthwhile leisure time activities.

22. To appreciate the duties, responsibilities and privileges of citizenship.

23. To develop skill in controls necessary for ecological harmony of man and the environment.

24. To develop the ability to make simple and correct choices.

25. To develop the ability to control and direct most of his own behavior.

Anyone may develop a list of 25 or more objectives for a program of this nature. This list is not in any manner complete or is the program necessarily limited to these objectives, but the objectives used are as a guide to initiate the lessons and experiences that follow.

C. SEQUENCE

Phase I: Focused on curriculum development, preparation of materials, purchasing of equipment, preparation of selected work-study stations, and pilot training in selected areas.

Phase II: Focuses on continuation of Phase I and expand into selected training programs as developed in Phase I.

D. FORMAT

Throughout an individual's life certain recurring functions are required by living in a democracy. These recurring functions were defined by Stratemeyer, Forkner, McKim and Passow in Developing a Curriculum For Modern Living (2nd Edition, 1957). There is a total of twelve Persisting Life Situations. When adequately met and resolved in concerted fashion, these represent the objectives and desirable outcomes of programs for the handicapped. In this curriculum, those Persisting Life Situation (P.L.S.) applicable to recreational and vocational knowledges and skills which can be learned in a school forest were developed. They are as follows:

P.L.S. #4 Learning to Handle and Adjust to One's Social, Technological and Physical Environment involves the essential habits, attitudes and skills necessary in using social amenities and customs, using tools and mechanical equipment and in understanding and adjusting to the physical environment.

P.L.S. #7 Learning to Earn a Living involves the essential habits, attitudes and skills necessary to be a good worker, knowing what jobs are available for him, preparing for and getting a job.

P.L.S. #8 Learning Homemaking involves the essential habits, attitudes and skills necessary for the feeding, clothing and housing of oneself and one's family.

P.L.S. #11 Learning to Appreciate, Create and Enjoy Beauty involves the essential habits, attitudes and skills necessary to develop and maintain an atractive appearance and to express oneself through a variety of media (crafts, music, art, dancing).

E. METHODS

(a) A series of discussions prior to the end of the school year were held to identify the goals and objectives of the project.

(b) Available pertinent publications were researched.

(c) Writing was done on an individual and group basis. Each member of the group contributed in the areas in which he felt competent. Results of the project were edited cooperatively.

(d) The final product was a result of the composite individual and group experiences and research.

F. EVALUATION

It was discovered that many of the projects planned could be done by students under supervision. Eighty-five percent (85%) of the educable students could complete a specified task under supervision. Sixty-five percent (65%) of the trainable students could be conditioned to do some work under direct supervision and aid.

G. RESOURCES

Nels P. Evjue Memorial School Forest and Outdoor Laboratory
Camp New Wood County Park
Wisconsin E.M.R. Curriculum Guide (Wisconsin Department of Public Instruction)
The Slow Learning Program in the Elementary and Secondary Schools (Cincinnati Guide) Ohio Curriculum Bulletin #119, 1964.
Teacher-Counselors
Special Education Students
Pamphlets
Textbooks
Manuals
Materials pertinent to the project
Films
Filmstrips

II. DEVELOPING PROGRAMS AND SERVICES FOR THE HANDICAPPED

A. GENERAL

1. Projects may be developed by a Local Education Agency (LEA), Cooperative Education Service Agency (CESA), County Handicapped Children's Education Board (CHCEB), or multidistrict cooperative agreements (66.30), to serve handicapped pupils through age 20 or graduation from high school.

2. Pupils to be served must meet the criteria for identifying handicapped persons as included in the Wisconsin State Plan for Vocational Education and the eligibility criteria for handicapped as established by the Wisconsin Department of Public Instruction (DPI). (See pp. 5 and 9 of this handbook.)

3. Personnel from the DPI, Vocational Education Programs Unit, and from the DPI Division for Handicapped Children's Services will be available as consultants on projects to advise in their particular areas of expertise.

B. PROGRAM REQUIREMENTS

Project proposals must meet the program requirements of the Wisconsin State Plan for Vocational Education; of special importance among the program requirements are the following:

1. Provide vocational education instruction which is realistic in terms of occupations suitable for handicapped persons as part of the total program whenever possible;

2. Provide orientation to work opportunities for handicapped persons to help lead them into realistic occupational training programs;

3. To the extent possible, relate to the total vocational education effort within the LEA, CESA, CHCEB and be identified as contributing to the accomplishment of a Local, Long-Range Plan for Vocational Education; and

4. Be developed in consultation with:

   (a) representatives of the employing community through advisory committees, etc.;

   (b) a Local Vocational Education Coordinator (LVEC) who serves the total program of vocational education within the LEA or CESA; and

   (c) the Special Education Director or, in the absence of such a director, the administrator's designee in that area of responsibility.

C. PROJECT PROPOSALS

Project proposals initially should be submitted in duplicate to the DPI Program Administrator for Vocational Education in letter of intent format. The letter of intent should contain the following information:

1. Legal name of submitting agency.

2. Descriptive title or name of project proposal.

3. Operational time of the proposed program (if the project is for more than one phase or fiscal year, this should be indicated in Nos. 5 and 7 below.

4. Purpose of the program.

5. Basic operational plan including children to be served, personnel to be involved, instructional methods to be used, LVEC's and other vocational education personnel involved, etc.

6. Expected outcomes of the program.

7. Total cost of the proposed program, including the breakdown by fiscal years of local costs, state share, other federal grants, and the vocational education act request.

8. A statement that the local board and district administrator approves the proposed project and the submission of the letter of intent.

9. Signature of the district administrator.

Letters of intent will be reviewed by professional personnel from the staff of the Vocational Education Program Unit and the Division for Handicapped Children's Services. A Priorities Committee will review all proposals and recommend to the VEA Program Administrator those proposals which are recommended for funding. The submitting agency designated in each letter of intent will be notified as to the action on their proposed project. Those projects which are approved for further funding consideration will then be submitted in detailed form using Form VE3 along with a complete description of the program operational plan.

Projects will be supervised and reviewed in operation by personnel of the DPI Division for Handicapped Children's Services with the assistance of the Vocational Education Program consultants as desired. All funded projects must meet the various annual reporting requirements of the Vocational Education Amendments, including enrollments, completions, follow-up and periodic descriptive reports of program progress and those requirements of the Division of Handicapped Children's Services.

D. HANDICAPPED

Excerpts from Federal sources on definitions of Handicapped Persons to be used in planning and evaluating vocational education programs.

From "Vocational Education, Rules and Regulations" PL 90-576:

102.3(o) "Handicapped persons" means mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, crippled, or other health impaired persons who by reason of their handicapping condition cannot succeed in a vocational or consumer and homemaking education program designed for persons without such handicaps, and who for that reason require special educational assistance or a modified vocational or consumer and homemaking education program."

From "Vocational Education for Handicapped Persons Handbook for Program Implementation", August, 1969:

"The handicapped are a diverse population within our society. They vary in characteristics to as large an extent as the non-handicapped. Classifications are only arbitrary labels used to describe persons with similar disabilities. A classification cannot serve as the basis for defining the type of program needed by a particular person. Each person should be individually assessed so that his program can be designed to meet specific needs."

E. MENTALLY RETARDED

For educational purposes, the mentally retarded are classified into two groups, educable and trainable.

The Educable:

This group will probably comprise the largest single block of students to be served by the vocational educator. Two to three percent of the general population is thought to be educable mentally retarded. Their rate of intellectual development ranges from 50% to 75% of normal intellectual growth, although these figures are arbitrary. While exceptions are common, the large majority of educable students will achieve maximally at the sixth grade level.

The Trainable:

The trainable respond more slowly to education and training than do the educable. Their rate of development is approximately one-quarter to one-half of the normal rate. An individual in this group is likely to have secondary physical or emotional problems in addition to retardation. Education and training emphasizes the acquisition or self-care skills; social adjustment to the family, school, and neighborhood; and economic usefulness in either the home or a sheltered situation. The trainable usually require some care, supervision, and economic support throughout life.

The Trainable - Continued

There are approximately three trainable individuals in every thousand people in the population. Vocational educators can expect to work with very few trainable students, although it is possible that these students might profit from exposure to selected aspects of the vocational education program.

Generally, the trainable are served in special schools or special classes in regular schools.

F. HEARING IMPAIRED

Students with impaired hearing are classified into two groups for educational purposes: the deaf and the hard of hearing.

Students are considered deaf when their sense of hearing is nonfunctional for ordinary purposes. There are two classes in thie group, based on the time when loss of hearing occurred: (1) the congenitally deaf - those who are born deaf; and (2) the adventitiously deaf - those who were born with normal hearing but whose hearing has become nonfunctional, due to illness or accident.

Although the sense of hearing in these students is defective, it is considered functional either with or without a hearing aid.

Approximately 1 student out of every 1,000 is deaf, 5 students out of every 1,000 are thought to be hard of hearing.

The deaf and hard of hearing are educated under many organizational plans, particularly resource rooms, itinerant specialists, and special classes. For severely hearing impaired youngsters many cities operate special residential schools. These schools serve rural, as well as urban areas.

G. SPEECH IMPAIRED

Speech is considered defective simply when its deviation from average speech draws attention to itself.

The major categories of speech defects are: (1) articulatory disorders, (2) vocal disorders, (3) stuttering, (4) delayed speech, and (5) speech disorders associated with cleft palate, hearing impairment of cerbral palsy.

About 80% of the speech cases in school are articulatory disorders which involve substitutions ("wight" for right, "yeth" for yes, "yeow" for yellow, etc.) omissions (consonants dropped), distortions (whistling the "s" sound) and additions (on-a the table).

H. VISUALLY IMPAIRED

For educational purposes, the visually impaired are classified into two groups, the blind and the partially sighted.

A blind student is one who has so little vision that the senses of touch and hearing must be substituted for sight when teaching. Braille is most often used by these students. Many magazines and books are regularly translated into braille for use by the blind. Tapes and records are also available. The reader is directed to the Instructional Materials Center at the American Printing House for the Blind, the Library of Congress, or to local service agencies for specific help in locating and identifying applicable instructional materials.

The partially sighted are able to utilize some remaining vision for learning. Special materials, instructional procedures, and conditions are incorporated to accommodate the students.

There are few blind and partially sighted persons in the general population by comparison with the mentally retarded. There are approximately three blind students and six partially sighted students out of every 1,000. Occasionally a visually impaired student will take part in vocational education, but as a rule specific programs should not be established in the public schools to serve this population. The visually impaired are educated in a variety of organizational arrangements related to the severity of loss of vision. The partially sighted are integrated as fully as possible into regular school programs with itinerant teachers and resource rooms available when necessary. Very often the blind are brought together in residential schools where the preparation for possible return to the community is intensive.

I. EMOTIONALLY DISTURBED AND SOCIALLY MALADJUSTED

Emotionally Disturbed:

The behavior of the student may be inappropriate to the point that it is both distracting and disruptive to the rest of the class, placing undue pressure on the teacher and intensifying the pupil's own problems.

Socially Maladjusted:

Students who are constantly causing trouble in school or at home (truants, predelinquents, delinquents, and "incorrigibles").

There are approximately 20 emotionally disturbed or socially maladjusted students out of every 1,000. These persons are educated most often in special classes or special schools. Due to poor identification procedures, many emotionally distubed or socially maladjusted students are not receiving adequate service. Many are in the regular programs and are not receiving special education.

J. CRIPPLED AND HEALTH IMPAIRED

These students have limited abilities in self-mobility, sitting in a classroom, and using materials for learning because of muscular and neuromuscular handicaps. These conditions include cerebral palsy, muscular dystrophy, multiple sclerosis, poliomyelitis, spina bifida, paraplegia, and heart conditions.

Some students have limited abilities, similar to those listed above, due to skeletal deformities. Examples include clubfoot, congenital dislocation of the hip, scoliosis (curvature of the spine), bone cysts, tumors, and conditions caused by accidents.

Other students have limited strength, vitality, and alertness for school work due to chronic health problems. Examples include heart conditions, tuberculosis, rheumatic fever, nephritis, infectious hepatitis, infectious mononucleosis, asthma, hemophilia, epilepsy, leukemia, and diabetes.

There are approximately 20 such students who suffer from one of these diseases out of every 1,000. This population should be integrated with regular students whenever possible, depending on the degree of impairment.

They may also be served in resource rooms, special day schools, special classes, hospital instruction, and homebound instruction.

K. SPECIFIC LEARNING DISABILITIES

Specific Learning Disabilities children have a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, which disorder may manifest itself in imperfect ability to listen, think, speak, read, write, spell, or do mathematical calculations. Such disorders include such conditions as perceptual handicaps, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia, but such term does not include children who have learning problems which are primarily the result of visual, hearings, or motor handicaps, of mental retardation, of emotional disturbance, or of environmental disadvantage.

III. GENERAL PROCEDURES FOR PROGRAM APPLICATIONS

A. ANNUAL APPLICATIONS

A project application is required each year for each funded course, workshop, LVEC, guidance program, or other fundable activity in vocational education. Project applications are submitted using the appropriate form provided by the Department of Public Instruction; these forms are described and illustrated in this Section.

The project application establishes several important things:

(1) that the program or activity meets, or continues to meet in case of renewal applications, the requirements of the Wisconsin State Plan for Vocational Education and the comprehensive program requirements as outlined in this Handbook;

(2) that project expenditures which are to be made are acceptable by the Department of Public Instruction and will be eligible for reimbursement after transactions have been completed.

The project application, when it has been reviewed and approved and a current number assigned by the Department of Public Instruction, begins the audit trail for program and fiscal accounting purposes. A copy of the approved financial portion of all approved applications are returned to the local educational agency as part of the approval procedure -- this approved financial portion (Part IV of the Form VE-3. for instance) clearly identifies those items which may be purchased in anticipation of subsequent partial reimbursement with federal funds.

The project application must present a complete picture of the program, position, or activity. The application form calls for the basic data required; applications should be supplemented with whatever additional information will help to give insight into the quality and objectives of the program.

B. RENEWAL APPLICATIONS

Renewal applications need not have every section of the application completed if the information reported on the initial or previous application continues to be accurate and complete. However, each renewal application for a Capstone course must have Part II completed with the name of the teacher, the teaching schedule, etc. whether or not the teacher salary is eligible for funding in that particular year.

C. APPROVED PROGRAM OBLIGATIONS

Teachers assigned to Capstone courses must be vocationally certified whether or not the Capstone course is funded in a given fiscal year. Once a Capstone course is approved for funding, it must continue to meet the requirements of the Capstone program (including the submitting of enrollment, completion and follow-up reports) whether or not funding is requested in subsequent fiscal years. If a Capstone course fails to meet requirements in subsequent years after equipment has been purchased for it in a prior year, federal regulation require that the equipment be sold and the federal government's equity be repaid.

D. SCHEDULE FOR RECORDS AND REPORTS

Enrollment Report (fall	PI-IS-VE-32 (Rev. '72)	December 1
Follow-up Report	PI-IS-VE-35	November 1
Teacher Status Reports	PI-IS-VE-37	November 29
Quarterly Report (1st) for LVEC's	PI-IS-VE-23	January 30
Quarterly Report (2nd) for LVEC's	PI-IS-VE-23	May 30
Annual Descriptive Reports (optional)		June 30
Completion Reports	PI-IS-VE-32 (Rev. '71)	June 30
Program Applications*		Renewals May 15 New January 15*
Encumbrance Reports	PI-AD-86	May 1
Claim Report	PI-AD-86	6 months after end of fiscal year
Inventory Reports	PI-AD-78	with claim
Inventory Verification		as instructed

*Includes PI-IS-VE-1, PI-IS-VE-2, PI-IS-VE-3, PI-IS-VE-4, PI-IS-VE-5, and PI-IS-VE-6.

IV. INSTRUCTIONS FOR COMPLETING VOCATIONAL EDUCATION APPLICATION PI-IS-VE-3 (REV. 4-70)

Course Information: Indicate type of program (regular or special needs). Indicate whether the application is new or renewal. Application date should reflect date application was filled out. (NOTE: Application must be submitted to and approved by DPI before purchases can be made or salary claimed.)

PART I - HEADING

Enter the number which designated the County, Local Education Agency, Co-operative Educational Service Agency and Vocational, Technical, and Adult District.

Enter distinctive school name (e.g., "Wisconsin Rapids-Lincoln" rather than "Lincoln High School", "Milwaukee West Division" rather than "West Division.")

Give descriptive title of course.

Enter the last assigned application number in prior application blank if this project has been previously submitted during this or any previous fiscal year.

1. Provide all information requested.
2. Provide all information requested.
3. Provide all information requested.
4. Refer to specific special surveys, follow-up studies and contact with WSES, etc.
5. See special lists published by DPI; use six-digig classifications.
6. Provide all information requested.
7. Provide all information requested.
8. Leave blank.

Financial Summary:

Indicate fiscal year during which encumbrances will be made. (Purchase orders place for services performed regardless of when payment is made; fiscal year extends from July 1 to June 30.)

Enter total in requested column from Part IV.

Financial Summary - Continued:

If salary is being requested, the chief administrator must certify that additional salary expense will be incurred by initialing the box next to the salary column.

Indicate date Local, Long-Range Plan was accepted and date that it was last updated.

The appropriate administrator and LVEC must sign the application. (Leave LVEC blank if none.)

PART II - HEADING

Fill in all appropriate boxes.

Show only vocational license by subject area issued by DPI.

Basic salary is that part of the total contract salary paid for teaching duties.

To compute the percent vocational, use the following formula:

$$\frac{\text{Number of hours teaching vocation course}}{\text{Total number of hours teaching (vocational course is included in this total)}}$$

Amount chargeable is computed by taking basic salary times the percent vocational.

1. Class period.
2. For modular scheduling, attach supplemtn.
3. Provide all information requested.
4. Provide all information requested.
5. Provide all information requested.
6. Provide all information requested.
7. Extended contract salary is only that salary that is being paid for the extended period of employment, summer, etc. (See above for computation of percent vocational and amount chargeable.)
8. Provide all information requested.
9. List specific related courses that contribute to the employable competencies developed in the Capstone course.
10. Give enough information so that classroom-laboratory facility can be evaluated in terms of adequacy for vocational education.
11. Provide all information requested.
12. Provide all information requested.
13. Provide all information requested.

PART III -

1. Provide all information requested.
2. Take the coordinator average travel time between work stations.
3. Average for entire class.
4. Provide all information requested.
5. Average number of visits to all work stations per month.
6. Provide all information requested.
7. Teacher of the Capstone course.
8. List sequence courses required.
9. Provide all information requested.
10. Provide all information requested.
11. Indicate the arrangements made with the Department of Industry, Labor and Human Relations.
12. Provide all information requested.
13. Describe any variance from co-op standards.
14. Provide all information requested.
15. Provide all information requested.
16. Provide all information requested.

PART IV -

1. See special sheet on priority of expenditures; a priority number must be listed for every item.
2. Provide all information requested.
3. Items that cost less than $10 per unit cannot be approved.
4. Provide all information requested.
5. Provide additional description of items to be purchased. If equipment is new and not a replacement for equipment already used, write "new" after the item.
6. Provide all information requested. List vendor of equipment.
7. Item numbers must be shown for every item listed. Item numbers should be continued on a consecutive basis throughout all applications for a fiscal period.

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION
VOCATIONAL EDUCATION APPLICATION
PI-1S-VE-3 (Rev. 11-71)

INSTRUCTIONS: Prepare in duplicate. Submit original only. Use additional sheets if necessary.

CAPSTONE COURSE: ☐ REGULAR ☐ SPECIAL NEEDS ☐ NEW ☐ RENEWAL APPLICATION DATE

PART I SUPPLEMENT TO LOCAL PLAN FOR VOCATIONAL EDUCATION

CO. & LEA NO.	CESA	VTA	SCHOOL OR AGENCY NAME	DESCRIPTIVE TITLE OF COURSE	APP. NO. (LEAVE BLANK)
					PRIOR APP. (IF ANY)

1. ATTACH MINUTES OF THE LAST ADVISORY COMMITTEE MEETING. ATTACH AN EXPLANATION IF NO MINUTES ARE AVAILABLE.

2. FOR RENEWAL COURSES PROVIDE THE FOLLOWUP INFORMATION FOR THE LAST YEAR'S COURSE GRADUATES. NUMBER OF:
- _____ EMPLOYED FULL TIME.
- _____ ENROLLED IN 2-YEAR VTA.
- _____ ENROLLED IN 4-YEAR COLLEGE
- _____ MILITARY
- _____ UNEMPLOYED
- _____ OTHER (SPECIFY) _____

3. MAJOR PERFORMANCE OBJECTIVES OF THIS CAPSTONE COURSE, (CHECK ONE OR MORE -EST. % OF ENROLLLEES):
- ☐ _____ % PREPARE LABOR MARKET ENTRANTS
- ☐ _____ % PREPARE FOR POST H.S. PROGRAM.
- ☐ _____ % OTHER (SPECIFY) _____
- ☐ _____ % OTHER (SPECIFY) _____
- ☐ _____ % OTHER (SPECIFY) _____

9. (LEAVE BLANK) PROJECT RATING:
- I. Manpower Needs: _____
- II. Voc. Educ. Needs: _____
- III. Special Needs: _____
- IV. Ability to Pay: _____
- V. Other: _____
- TOTAL _____

4. ESTIMATED ENROLLMENT IN CAPSTONE COURSE.
- _____ THIS YEAR
- _____ NEXT YEAR
- _____ IN FIVE YEARS

5. BASIS FOR DETERMINING NEED FOR OFFERING A COURSE IN THIS OCCUPATIONAL AREA – INCLUDE MANPOWER DATA AND SOURCE OF INFORMATION.

6. GIVE TITLES AND NUMBERS OF OCCUPATIONS PREPARED FOR – USE 6 DIGIT OE CODES.

7. IDENTIFY BY NAME THE PRIMARY LABOR MARKET(S) INTO WHICH GRADUATES OF THIS COURSE WILL PROBABLY ENTER.

8. INDICATE THE NUMBER OF STUDENTS IN THIS COURSE WHO ARE:
- _____ (a) DISADVANTAGED
- _____ (b) HANDICAPPED

8A. OF THOSE DISADVANTAGED, HOW MANY ARE:
- _____ (a) POTENTIAL OR ACTUAL DROPOUTS.
- _____ (b) FROM POVERTY FAMILIES.
- _____ (c) MEMBERS OF MINORITY GROUPS.
- _____ (d) UNDERACHIEVERS.
- _____ (e) BORDERLINE IQ.
- _____ (f) OTHER. (SPECIFY) _____

8B. OF THOSE HANDICAPPED, HOW MANY ARE:
- _____ (a) MENTALLY RETARDED.
- _____ (b) HARD OF HEARING.
- _____ (c) DEAF.
- _____ (d) SPEECH IMPAIRED.
- _____ (e) VISUALLY HANDICAPPED.
- _____ (f) SERIOUSLY EMOTIONALLY DISTURBED.
- _____ (g) CRIPPLED.
- _____ (h) SPECIAL LEARNING DISABILITIES.
- _____ (i) OTHER. (SPECIFY) _____

10. IF THIS A SPECIAL NEEDS PROJECT, ATTACH A DESCRIPTION OF SERVICES OR ACTIVITIES WHICH ARE PROVIDED FOR THESE PUPILS. IF DISADVANTAGED AND HANDICAPPED ARE ENROLLED IN A REGULAR CAPSTONE COURSE, EXPLAIN HOW THEY ARE PROVIDED WITH SPECIAL SERVICES OR RESOURCES NOT AVAILABLE TO REGULAR STUDENTS.

LOCAL (LONG RANGE) PLAN FILED (ACCEPTED) ON:	UPDATED(MOST RECENT)	

STATEMENT OF ASSURANCES

THE BOARD OF EDUCATION, IN MAKING APPLICATION, AGREES TO COMPLY WITH THE FEDERAL AND STATE REGUALATIONS IN SUCH MATTERS AS

1. MAINTENANCE OF EFFORT IN TERMS OF THE LEA'S SHARE OF EXPENDITURES.
2. MAINTENANCE AND AUDITING OF FISCAL RECORDS IN SUCH A WAY AS TO AVOID THE COMMINGLING OF VEA AND OTHER FUNDS
3. SUBMISSION OF NECESSARY REPORTS TO THE STATE SUPERINTENDENT.
4. ALL ITEMS REQUESTED ARE APPROVABLE ACCORDING TO THE STATE PLAN, TO THE BOARDS BEST KNOWLEDGE OF IT.

SIGNATURE (HEAD ADMINISTRATOR)	DATE
SIGNATURE (LVEC)	DATE

PART II

Teacher's Name	Voc. Lic. Type	Years Teaching	Basic Salary	% Vocational	Amt. Chargeable

1 Class Period	2 Subject, Administrative Duties, or Other Assignments (For Modular Scheduling, Please Attach Supplement)	3 Minutes Per Day	4 Day Per Week	5 Total No. Of Students	6 Comments
1					
2					
3					
4					
5					
6					
7					
8					

7 Extended Contract (Nature of Duties. Required for Cooperative Education Program)

Dates Covered

Extended Contract Salary	% Vocational	Amt. Chargeable

	8 Course Title	Est. Enroll By Grade	Minutes Per Day	Days Per Week	No. Of Weeks	Text Books and Other Resources	Teacher(s)
CAPSTONE							
PREREQUISITE (Required)							

9 Other Courses Available and Desirable But Not Required

10 Describe The Classroom Laboratory Available For This Program. (Size of room, groupings of equipment, etc.)

11 Attach Curriculum Plan and Course Outline. (If This is a New Program)

12 Name Local Youth Group That Will Participate, If Any

- ☐ FBLA
- ☐ FHA
- ☐ DECA
- ☐ FFA
- ☐ _____
- ☐ _____

13. How They Will Supplement Class Experience.

PART III

COMPLETE THIS SECTION ONLY IF STUDENTS ARE PLACED ON JOBS AS COURSE REQUIREMENT

1. No. of Training Stations	2. Average Travel Time Between School and Work Station	3. Number of Hours Per Week (Including Weekends)	No. of Weeks
		On Job	
4. No. in the Capstone Class	5. No. of Times Per Month That Work Stations Will Be Visited	School	
		TOTAL	
6. No. of Capstone Students that will be placed on jobs as course requirement	7. Teacher(s)	8. Related Class(es) Required	
9. No. of School Credit to be Given for On-The-Job Training	10. Are Students Receiving the Minimum Wage?	11. What Provisions are Being Made if Student is Receiving Sub-minimal Wage?	

12. Describe How The On-The-Job Training Will be Related to the Classroom Instruction.

13. Describe Innovations or Variances From Cooperative Education Standards.

14. Organizations or Groups Which Will Help to Identify Training Stations.

15. List Coordination Activities In Addition to Work Station Visitations. (Also attach the Training Agreement and A Sample Training Plan.)

16. Justify Unusual Cooperative Education Costs. (In addition to regular coordination time, extended contract and travel for coordination.)

PART IV FINANCIAL PLAN

PAGE _____ OF _____.

O. & LEA NO.	CCSA	VTA	SCHOOL OR AGENCY NAME	DESCRIPTIVE TITLE OF COURSE	APP. NO. (LEAVE BLANK)	

1 Prior ity No	2. Qty.	3.Unit Cost	4 Item or Teacher's Name	5. Designate Salary Period Or Supplier (If Known)	6. Total Cost	7. Item No.
				TOTAL REQUESTED		

ITEM	EXPENDITURE TOTALS FOR FY	
	REQUESTED	APPROVED
01 SALARIES		
02 EQUIPMENT		
03 OTHER		
TOTAL		

I CERTIFY THAT ADDITIONAL SALARY EXPENSE HAS BEEN OR WILL BE INCURRED DUE TO THIS NEW COURSE OFFERING. | INITIALS OF SUPT

DATE APPROVED	PROJECT RATING	REIMBURSEMENT RATE	TOTAL APPROVED

APPROVED (STATE SUPERVISOR)

V. PRIORITIES OF EXPENDITURES

Priority Number & Level	Description of Expenditure	Expenditure Type	Uniform Account Number
1a.	Salary of a certified LVEC who is employed as an LVEC at least half-time.	1	1114
1b.	Salary of a new, certified teacher for Capstone teaching, sequence teaching, special initial-year planning time, and coordination time in projects which introduce a new discipline (two-digit code). (One year only)	1	1115
1c.	Salary of a new, certified teacher for Capstone teaching, special initial-year planning time, and coordination time in projects which introduce a new Capstone course into a discipline already in existence in the school or cluster of schools. (One year only)	1	1115
2a.	Equipment required for a Capstone course, including the rental of equipment normally purchased and which leads to ownership.	2	2383
2b.	Local travel of certified LVEC, counselor, coordinating teaching in a cooperative education or coordinated/simulation Capstone course, or agriculture teacher for farm and project visits.	3	1194
2c.	Salary of a certified teacher of a Capstone course for coordination time, summer employment, and supervised agriculture projects	1	1115
2d.	Procurement and processing of special tests and materials used in guidance projects directly related to career development and/or job placements.	3	1140
2e.	Salary of a full-time city supervisor in a vocational subject area under the direction of a city-side LVEC when LVEC's are not employed in each high school building in the district.	1	1114
2f.	Salary or fees of approved personnel who participate in career development workshops which implement the Wisconsin Guide.	1	1114 or 1115
2g.	Cost of contracted services which assess and evaluate learning abilities of students with special needs in relations to vocational preparation.	3	1129
2h.	Salary and fees of approved personnel for special planning related to vocational education, career development, or consumer-homemaking projects	1	1114 or 1115

Priority Number & Level	Description of Expenditure	Expenditure Type	Uniform Account Number
2i.	Costs of items included in special research projects in vocational education and career development:		
	Salaries	1	1114 through 1117
	Consultant fees	3	1124
	Other contracted services	3	1129
	Supplies	3	1140
	Travel		
3a.	Rental of equipment, for a Capstone course, which will not be purchased or owned by the district.	2	2383
3b.	Materials required for individualizing instruction in Capstone courses.	3	1140
3c.	Salary of certified vocational personnel in mobile units which serve multiple schools. (Up to three years)	1	1114
3d.	Contracts with vocational-technical schools or other public institutions which offer vocational-technical programs for Capstone-level instructional programs which cannot feasibly be offered in a high school or cluster of schools.	3	1129
3e.	Special audio-visual equipment which is required in a Capstone course to provide individualized instruction or to augment unique phases of instruction in the Capstone course if the equipment is placed in and retained in the Capstone course classroom or department.	2	2383
3f.	Salary of additional guidance personnel in a K-12 career development program where the additional personnel augments an on-going, regular approved guidance and counseling program. (Up to three years)	1	1116
3g.	Transportation of students in Capstone courses which serve more than one high school.	3	1499
3h.	Rental of facilities required to offer new and improved Capstone courses. (Up to three years)	2	1751
3i.	Materials needed to provide basic or remedial instruction with a vocational emphasis to students with special needs.	3	1140
4a.	Salary of steno-clerical help assigned to funded LVEC.	1	1117
4b.	Salary of para-professional or skilled technician who is employed to assist with instruction in a Capstone course under the supervision of a licensed teacher.	1	1119
4c.	Fees of resource people employed for vocational inservice programs or workshops.	3	1196

Priority Number & Level	Description of Expenditure	Expenditure Type	Uniform Account Number
4d.	Special furniture or furnishings directly related to the instructional process in Capstone courses.	2	2383
3a.	Rental of equipment, for a Capstone course, which will not be purchased or owned by the district.	2	2383
3b.	Materials required for individualizing instruction in Capstone courses.	3	1140
3c.	Salary of certified vocational personnel in mobile units which serve multiple schools. (Up to three years)	1	1114
3d.	Contracts with vocational-technical schools or other public institutions which offer vocational-technical programs for Capstone-level instructional programs which cannot feasibly be offered in a high school or cluster of schools.	3	1129
3e.	Special audio-visual equipment which is required in a Capstone course to provide individualized instruction or to augment unique phases of instruction in the Capstone course if the equipment is placed in and retained in the Capstone course classroom or department	2	2383
3f.	Salary of additional guidance personnel in a K-12 career development program where the additional personnel augments an on-going, regular approved guidance and counseling program. (Up to three years)	1	1116
3g.	Transportation of students in Capstone courses which serve more than one high school.	3	1499
3h.	Rental of facilities required to offer new and improved Capstone courses. (Up to three years)	2	1751
3i.	Materials needed to provide basic or remedial instruction with a vocational emphasis to students with special needs.	3	1140
4a.	Salary of steno-clerical help assigned to funded LVEC.	1	1117
4b.	Salary of para-professional or skilled technician who is employed to assist with instruction in a Capstone course under the supervision of a licensed teacher.	1	1119
4c.	Fees of resource people employed for vocational inservice programs or workshops.	3	1196
4d.	Special furniture or furnishings directly related to the instructional process in Capstone courses.	2	2383
4e.	Special materials approved for projects in consumer-homemaking and special needs.	3	1140
4f.	Travel lodging and meals for attending DPI - sponsored conferences.	3	1194

Special Notes and Requirements:

1. A local maintenance of effort requirement must be met in all projects to satisfy the federal regulations relating to the vocational education legislation.

2. Any item or expenditure category not included in the above list cannot be approved for reimbursement with federal vocational education funds.

3. Items costing less than $25 per unit will not be approved; exceptions can be made in special cases where resource centers or special libraries are to be developed under guidelines established by subject-area consultants.

4. The above priorities and requirements will be effective with projects approved for Fiscal Year 1973 funding.

VI. TRAVEL REIMBURSEMENT POLICY AMENDED JULY 1, 1970

Effective July 1, 1970, reimbursement for vocational travel will include travel costs incurred in school-owned vehicles at the rate of 6¢ per mile. If the school district can clearly substantiate and document a higher cost per mile, reimbursement will be based on the figures provided by the school district.

Periodic mileage reports documenting the date, destination and purpose of travel must be submitted to substantiate all mileage claimed. The rate of reimbursement per mile must also be shown.

Each mileage report must be marked "PAID" with the date and number of the check issued to the individual staff member if a private car is used. Otherwise, indicate "School Vehicle" on all mileage reports submitted.

Those districts which pay the individual staff member a flat rate per month for travel may receive reimbursement provided the Superintendent or his designated school official certifies that the amount claimed is directly applicable to the Vocational Education program and includes local mileages only. The number and date of each check issued must be documented, unless travel allocations are included in the payroll.

As in the past, no reimbursement will be made for meals or lodging except for attendance at approved conferences sponsored by the Department of Public Instruction. At each qualifying conference, the extent of reimbursement will be announced, and if necessary reimbursement forms (VE-14) provided. Out of state mileage is not reimbursable except in the case of joint school districts which cross state lines.

VII. GENERAL PROCEDURES

The fiscal reports required for funding under the Vocational Education Act consist of an encumbrance report which obligates funds for future use and a claim report which documents expenditures to be reimbursed. Both of these reports are filed on the Report of Local Expenditures, form PI-AD-86.

Although it is feasible to encumber and claim on the same report, we require that two separate forms be submitted. This simplifies the procedure in completing each report and helps avoid errors and omissions. It also provides an opportunity for the district to review corrected encumbrance records and revise claims accordingly before submission.

Quotable Quote from First National Report of the National Advisory Council on Vocational Education, July 15, 1969:

The attitude that vocational education is for somebody else's children must change. The number of jobs which the unskilled can fill is declining rapidly. The number requiring a liberal arts college education, while growing, is increasing far less rapidly than the number demanding a technical skill. In the 1980's it will still be true that fewer than 20 percent of our job opportunities will require a four-year college degree. In America every child must be educated to his highest potential, and the height of the potential is not measured by the color of the collar.

REPORT OF LOCAL EXPENDITURES

PI AD 86 (Rev. 10 72) Page 3

Summarize Part I into Part II by account numbers. Column 1 minus column 2 minus column 3 must equal column 4 by account numbers and in total. It is imperative that all totals cross check.

PART II.

COUNTY AND DISTRICT NO.	CESA	PROJECT NO.	SCHOOL DISTRICT NAME	SCH. NO.	REPORT FOR PERIOD ENDING	FEDERAL PROGRAM

PROJECT NAME	PROJECT BEGINNING DATE	PROJECT ENDING DATE

ACCOUNT NUMBER	EXPEND TYPE	ACCOUNT NAME	1. APPROVED BUDGET	2. UNLIQUIDATED ENCUMBRANCES	3. TOTAL AMOUNT PAID TO DATE	4. UNENCUMBERED BALANCE
			$	$	$	$
		TOTAL	$	$	$	$

PART III.

1. CASH SUMMARY FOR THE PERIOD ENDED	
A. BUDGET AMOUNT - TOTAL COLUMN 1.	$
B. TOTAL FUNDS RECEIVED TO DATE	$
C. PAID TO DATE - TOTAL COLUMN 3.	$
D. CASH ON HAND - END OF PERIOD, + (-) (LINE B MINUS LINE C MUST EQUAL TOTAL COLUMN 5 PART I)	$

PART IV.

THIS REPORT IS A REQUEST FOR: (CHECK APPROPRIATE BOXES)

☐ ADVANCE ☐ FINAL CLAIM

☐ PARTIAL CLAIM ☐ ENCUMBRANCE REPORT

AMOUNT REQUESTED $

CERTIFICATION

I CERTIFY that all entries reported herein are properly substantiated; have not been claimed under any other state or federal program for any duplication of support; are in agreement with generally accepted state and federal audit policies, procedures or regulations; and that no instructional equipment or material originated in, nor was exported from any communist country.

SIGNATURE: (DISTRICT ADMINISTRATOR)	DATE	SIGNATURE: (LVEC)	DATE

DO NOT WRITE BELOW THIS LINE—FOR DEPARTMENT USE ONLY

SIGNATURE: (PROGRAM ADMINISTRATOR)	DATE	AMOUNT APPROVED

34

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION
REPORT OF LOCAL EXPENDITURES
PI AD-86 (Rev. 10-72) Page 1.

INSTRUCTIONS: Please refer to the reverse side of Page 1 for instructions to complete this report. Brought forward balances at the beginning of a report are column 2 encumbrance amount, column 3 amount paid, column 4 unencumbered balance, and column 5 cash on hand from the previous report. Item 1 approved budget equals the total of column 2 encumbrances plus column 3 amount paid plus column 4 unencumbered balance.

PART I. PAGE ___ OF ___ PAGES

COUNTY AND DISTRICT NO.	CESA	PROJECT NO.	SCHOOL DISTRICT NAME	SCH NO.	REPORT FOR PERIOD ENDING	FEDERAL PROG.	1. APPROVED BUDGET

DATE	DOCUMENT IDENT.	CHECK NUMBER	ITEM NO.	VENDOR NAME AND/OR ITEM DESCRIPTION	ACCOUNT NUMBER	2. ENCUMBRANCE + LIQUIDATION ( ) AMOUNT	3. AMOUNT PAID	4. UNENCUMBERED BALANCE	5. CASH ON HAND
				BROUGHT FORWARD		$	$	$	$
				CARRIED FORWARD		$	$	$	$

85

VIII. ENCUMBRANCES

All items which are to be reimbursed under the Vocational Education Act must be obligated by the local district sime time between the project approval date and the end of the fiscal year (June 30). This is done by submitting an encumbrance report (Report of Local Expenditures, form PI-AD-86) to the fiscal section of DPI as soon as possible after final approval is received. A separate report must be filed for each approved project.

The encumbrance report reserves funds the district anticipates spending, as documented by purchase orders, contractural agreements, etc. Copies of this documentation, except for teacher contracts, must be submitted with the Report of Local Expenditures to properly encumber the project.

Item numbers from the project approval should be indicated next to each item on the purchase order and the cost of each item must be identified separately. Since reimbursement is limited to the total amount encumbered, it is wise to enter the total amount approved for each item on the purchase order. This insures the availability of sufficient funds to cover cost increases, freight charges, etc.

The information from the purchase orders is summarized in detail on Part IV of the Report of Local Expenditures, form PI-AD-86. It includes:

A. The date of the purchase order - column 1
B. The purchase order number - column 2
C. A description of the item orders - column 3
D. The item number - column 3a
E. The account code - column 4
F. The amount of the purchase order - column 5

Note that it is more important to give the name of the item than the manufacture or vendor. The latter should only be shown if room permits.

The account code numbers may be taken directly from the state accounting manual. They are also cross-referenced on the Priority of Expenditures listing.

When encumbering salary items:

A. Enter the entire amount approved for salary at one time.

B. Indicate the name and social security number of the instructor, and the period of time covered by the salary in column 3. All salaries are funded on a fiscal year basis (July 1 - June 30), regardless of the contract year for the local district.

Enter only one item per line. As each encumbrance is made, the unused portion of the project approval (column 8) decreases. Subtract the amount entered in column 8 to arrive at the new total.

If an item is encumbered for an incorrect amount, re-enter it showing only the amount to be added or subtracted in column 5, see sample form, line 9.

After all items have been encumbered and entered on Part IV, complete the cover page of the report.

A. Enter the general information at the top of the page.

1. Be sure to include the curriculum code as part of the project number.

2. The beginning date is the same as the project approval date.

3. The ending date is June 30 unless otherwise indicated.

B. On Part I, mark the box "Encumbrance Report" only.

C. Enter the date of the report in Part II.

1. On line A, enter the total amount approved for the project.

2. Since no payments are shown on this report, lines B, C, and D will be "0", and the Available Balance, (line E) will be the same as line A.

D. Summarize the information shown on Part IV by account code and make the appropriate entires on Part III.

1. The account codes (column 1) and expenditure types (column 2) are cross-referenced in the Priority of Expenditures.

2. In column 4, enter the total amount approved for each account code as shown on the project approval. The total of this column will equal the amount shown on Part II, line A.

3. Since no payments are included on this report, the amounts in column 5 will equal the amounts encumbered for each account code. The total should equal the total of column 5, Part IV.

4. Column 6 equals "0".

5. Column 7 equals column 4 minus column 5. The total should equal the balance in column 8, Part IV.

6. Total each column. The balance of columns 5, 6, and 7 should equal the total of column 4.

Usually it is sufficient to file only one encumbrance report for each project. However, if one or two items remain questionable after the bulk of the project has been ordered, a partial encumbrance may be filed.

Copies of any corrections will be returned to the local district in two or three weeks. If the reports are correct as submitted, no notification will be sent to the district.

IX. CLAIM FOR REIMBURSEMENT

All items funded under the Vocational Education Act are done so on a reimbursement basis only. This means that the local district must pay for each item before it can receive any federal funds for it. Reimbursement is claimed through DPI by submitting a Report of Local Expendisutres to the fiscal section.

Claims for reimbursement may be submitted at the discretion of the local district. It is usually more efficient to accumulate several items on each report, and often only one claim need be made for the entire project.

At least partial claim for reimbursement must be filed within six months of the close of the fiscal year (December 31). Final claims are due by December 31 of the following year.

A separate claim form is required for each project. It must be accompanied by copies of all invoices, marked PAID with the date and number of the check issued indicated on the face of the invoice. Item numbers from the project approval should be indicated next to each item on the invoice and the cost of each item identified separately.

Mileage claimed must be documented with periodic reports showing the date, destination and purpose of travel. The rate of reimbursement per mile must also be shown. Each mileage report must be marked "PAID" with the date and number of the check issued indicated across the front. If a school vehicle is used, a notation to that effect should be made on every mileage report submitted.

Those districts which pay the staff member a flat rate per month for travel may receive reimbursement provided the Superintendent or his designee certifies the amount claimed is directly applicable to the approved Vocational Education program and includes local mileage only. The number and date of each check issued must be listed unless mileage is paid as part of the regular salary.

An inventory of all items on the claim which cost $100.00 or more per unit must also be submitted at this time. Refer to the section on inventory records for more information.

Part IV of the Report of Local Expenditures provides a detailed summary of the information provided on invoices and mileage reports. It includes:

A. The date of the check issued - column 1
B. The invoice number - column 2
C. A description of the equipment purchased - column 3
D. The item number - column 3a
E. The account code - column 4
F. The amount paid as shown on the invoice - column 6
G. the number of the check issued - column 7

Note that it is more important to give the name of the item ordered than the manufacturer or the vendor. The latter should only be shown if room permits.

The account numbers may be taken directly from the state accounting manual. They are also cross-referenced on the Priority of Expenditures listing.

When claiming salary:

A. Enter the entire salary as one payment.

B. Indicate the name, social security number of the instructor and the period of time covered by the salary in column 3. All salaries are funded on a fiscal year basis (July 1 - June 30) regardless of the contract year for the local district.

C. Indicate "Payroll" in the check number column.

D. Salary may not be claimed until after completion of the contract period covered.

Only one item may be entered per line of the report. As each payment is made and noted, the corresponding encumbrance must be liquidated. This is done by entering the amount originally encumbered in column 5 in parentheses to indicate subtraction. Thus with each payment, the balance in column 5 decreases so that on the final claim it reaches 0.

If more than one payment will be shown against a single encumbrance, liquidate only the amount paid each time. When the final payment is made for this item, liquidate the remaining encumbered balance to close out the item.

Column 8 represents the unused portion of the project approval. As each entry is made, the new total in column 8 is determined by:

A. Adding the amount liquidated (column 5)

B. Subtracting the amount paid (column 6)

Thus if the payment is less than the amount originally encumbered, the balance in column 8 will increase. If the payment is more than the amount originally encumbered, the balance in column 8 decreases. If the payment equals the amount originally encumbered, the balance in column 8 remains the same. The totals of columns 5, 6, and 8 should equal the amount approved for the project.

After Part IV is completed, fill out page one of the Report of Local Expenditures.

A. Enter the general information requested at the top.

1. Be sure to include the cirriculum code as part of the project number.

2. The beginning date is the same as the project approval date.

3. The ending date is June 30 unless otherwise indicated.

B. On Part I, indicate whether this is a partial or final claim only.

C. Enter the date of the report in Part II.

1. On line A, enter the amount approved for the project.

2. Omit line B.

3. Enter the total payments made on this project as indicated on all claim reports submitted to date. This is the same as the total shown on Part IV, column 6.

4. Omit line D.

5. Subtract line C from line A to determine the Available Balance (line E).

D. Summarize the information shown on Part IV by account code and make the appropriate entries on Part III.

1. The account codes (column 1) and expenditure types (column 2) are cross-referenced in the Priority of Expenditures.

2. In column 4, enter the total amount approved for each account code as shown on the project approval. The total of this column will equal the amount shown on Part II, line A.

3. In column 5, enter the total unliquidated encumbrances for each account code (amounts encumbered but not yet paid). If this is a final claim all encumbrances should have been liquidated and the amount entered would be "0". The total of this column should equal the total of column 5, Part IV.

4. In column 6, enter the total paid to date for each account code. The most current figures from this column would be reported to State Aids each year on the annual report. The total of column 6 should equal the total on Part IV, column 6.

5. Subtract the amount shown in columns 5 and 6 from the amount shown in column 4, and enter the result in column 7. The total of column 7 should equal the total shown on Part IV, column 8.

6. Total each column. The totals of column 5, 6 and 7 should equal the total of column 4.

Each claim for reimbursement must be signed by two different school officials. If one man is both the district Administrator and Secretary of the Board, another designated official must co-sign the report. The co-signer may be the district treasurer, LVEC, high school principal, etc.

Allow four to six weeks for processing between the time the claim is submitted and payment is received. A corrected copy of the entire claim report is forwarded to the district administrator with a copy of the check transmittal at the same time reimbursement is forwarded to the district treasurer. These reports should be carefully reviewed for possible error before filing. Any questions about the amount of reimbursement received should be directed to the fiscal section of DPI.

X. NON-REIMBURSABLE ITEMS

The following items cannot be approved for reimbursement under the Vocational Education Act:

A. Items not approved on form VE-3, Part IV, or subsequent change requests (form VE-11).

B. Items on the original approval ordered prior to the project approval date, or the start of the fiscal year (July 1) whichever is later.

C. Items on change requests ordered prior to the approval date of the request.

D. Items ordered after the close of the fiscal year (June 30).

E. Items billed at less than $10.00 per unit, EXCEPT for guidance materials (priority 2d).

F. Cost of any item in excess of 110% of the approved amount.

G. Any cost in excess of the total amount approved for the project.

H. Any cost in excess of the total amount encumbered per expense code.

I. Any amounts claimed for out of state travel except where a joint school district crosses state lines.

J. Costs for meals and lodging unless costs are incurred for attendance at approved Department of Public Instruction conferences.